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Memorandum

To: WHOI Postdoctoral Scholars, Fellows and Investigators and their Advisors/Supervisors

From: Rob L. Evans

A handwritten signature in blue ink, appearing to be 'R. Evans'.

Date: July 20th 2023

Re: Guidelines for Discussing Advisor-Postdoc Expectations and Responsibilities

Attached is a 2 page document that you can use for an initial discussion between advisors/supervisors and new postdocs soon after they arrive at WHOI. The goal is to assist the incoming postdoc and their advisor/supervisor in defining expectations, roles and responsibilities for the postdoctoral period. The document is meant to be a guide, not a checklist, and I am sure there are other important topics that could be discussed. Some of the topics should be periodically re-visited in response to changing circumstances and opportunities. Some of the topics might be appropriate as part of the annual merit raise review process.

Ideally, the postdoc and the advisor/supervisor will have this discussion before the postdoc has their initial meeting with me. During our initial meeting, I will ask if such a conversation has occurred and if it raised any issues that need to be resolved.

Guidelines for Discussing Advisor-Postdoc Expectations

The first section of this short document serves as a guide for an initial discussion between a postdoctoral researcher and their advisor/supervisor. **The goal of this discussion is for the Advisor/Supervisor and Postdoc to understand their respective expectations for the postdoctoral period. It should occur within the first month of the appointment and follow-up discussions are encouraged.**

Postdocs are also encouraged to meet with their department chair and departmental Education Coordinator and/or Postdoctoral Coordinator. These meetings should occur before the Postdoc schedules their initial introductory meeting with the Dean. Both the Chair and the Ed Coordinator, as well as the Dean, are resources to help resolve any issues that might develop between the supervisor and postdoc.

The second section gives examples as to what is required to be a good Postdoc advisor/supervisor.

Section 1. Possible Topics to be discussed by the Postdoctoral Scholar, Fellow or Investigator with their Advisor(s)/Supervisor(s)

- Set a schedule for regular meetings to discuss progress.
- Points of contact within their Department and APO should they have any questions, concerns or issues that require assistance.
- Source of funding for the postdoc and the responsibilities that accompany it. Possibilities for extending beyond the time of the initial appointment.
- Grant mobility should the postdoc receive a grant as well as issues related to intellectual property and research direction following the postdoc period.
- Source of funds for supplies, analytical services, computing, etc.
- Options for field work/cruises required/desired for research plan.
- Possibilities for attending national or international meetings and source of funding.
- Publication and authorship expectations, as well as costs associated with publications, including any costs associated with publishing thesis and other work completed prior to the WHOI postdoc period.
- Attendance at departmental seminars and other seminars (research group, etc.) as appropriate. Timetable for departmental or other seminars.
- Introductory meetings with other members of the host Department and other Departments and Centers.
- Participation in postdoctoral career enhancement activities sponsored by the Academic Programs Office or other groups at WHOI. Continuation of career development, including applying and interviewing for jobs as appropriate.

Prospects/options for a scientific/technical staff appointment at WHOI.

- Formulation of a plan for submitting and/or publishing Ph.D. thesis papers.
- Content of Activity Report (for evaluating merit salary increase).
- Other expectations of the postdoc and the advisor/supervisor.

Section 2. A Good Postdoc Supervisor Should:

- Provide guidance for the postdoctoral research project while also encouraging and allowing for increasing independence and freedom to demonstrate capabilities (within funding constraints).
- Understand the postdoc's expectations for learning new techniques and trying new research directions during their time at WHOI.
- Meet periodically with the Postdoc to review and assess progress towards expectations and revise as appropriate.
- Make sure the Postdoc is aware of points of contact and assistance within their Department and APO and who can help them with various issues or concerns that might arise.
- Introduce Postdoc to colleagues at WHOI and elsewhere.
- Provide appropriate opportunities for career enhancement such as:
 - Offer/encourage training in the different strategies and styles for research proposals submitted to various sources of funding.
 - Encourage the postdoc to participate as Co-P.I. on proposals, when appropriate.
 - Give the postdoc an opportunity to comment on manuscripts from the group.
 - Encourage when appropriate for postdoc to review manuscripts and proposals in parallel with supervisor.
 - Encourage postdoc to present papers at national/international meetings; giving constructive feedback about preparations of talk or poster before the meeting; offer constructive feedback about talk or poster presentation at the meeting; introduce postdoc to colleagues at meeting.
 - Make postdoc aware of job opportunities.
 - Inform postdoc on job opportunities at WHOI, i.e. what are the job possibilities at WHOI.
 - Give constructive feedback on job applications, including research & teaching statements, CVs, and cover letter